

Performance: Complete an Individual Performance Plan & Evaluation (IPPE) Manager

PERFORMANCE REVIEWS

Before starting in Workday, you will complete the entire performance review on the DAS form, including meeting with employee and obtaining signatures on the original paper copy. Scan the completed form to your computer and have the PDF document ready for attachment in Workday.

From the **Search Bar** in Workday:

1. Type **Start Performance Review for Employee**.
2. Click **Start Performance Review for Employee**.

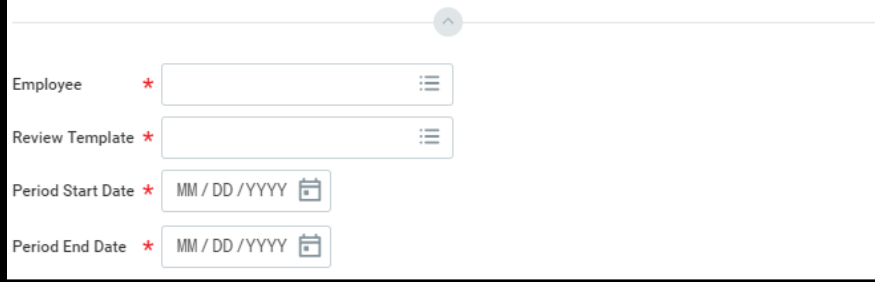
Start Performance Review for Employee



For the evaluation period to be valid it can only be the most recent 12 months and must be signed within 30 days from the end of the evaluation period.

For example, the evaluation could be for 5/1/18 to 5/1/19; and it would need to be signed by 5/31/19.

If the evaluation period is not valid, the evaluation will need to be corrected before the HR partner can approve it.

For probationary employees, the period covered should be less than 6 months.



3. Click  in the **Employee** field, then **My Team** and select the employee's name.
4. Click  in the **Review Template**, select **Upload Final Review**, then **Upload Finalized Review**.

5. Enter **Period Start Date** and **Period End Date** for the rating period.
6. Click **Submit**.
7. Click **Open** or you can go to your **Inbox – Manager Evaluation**.
8. For **Date** enter the 10-character date (ex. 05/20/2019) of the manager's signature in the free text box.
9. For **Overall Result**, select **Rating** from drop down menu (Meets, Exceeds or Does Not Meet).
10. Under **IPPE Attachment**, click **Add** and then **Attach** to upload the completed IPPE as a PDF and add a comment "IPPE – Employee Name".
11. Click **Submit**.
12. This will then route to the HR Partner for final approval.



Note: If this the employee is out on Military Leave of Absence, the employee will still get a within-grade increase as long as they have a previous IPPE on file with an end date in the last 12 months. Please find the Military Leave Performance/Increase form and time spent on Military Leave shall be considered to "Meet job Expectations". Please ask your HR Partner if you have more questions.

IF THE IPPE IS NOT APPROVED AND IS SENT BACK BY THE HR PARTNER.

1. Go to **Inbox** and select **Manager Evaluation: Upload Finalized Review: Employee Name**.
2. Scroll down and look at the **Comments** left by the HR Partner for the send back reason.
3. Reasons for send back:
 - a) If **Review Signature Date** is the reason for the send back, you can edit the manager signature date in the **Inbox**

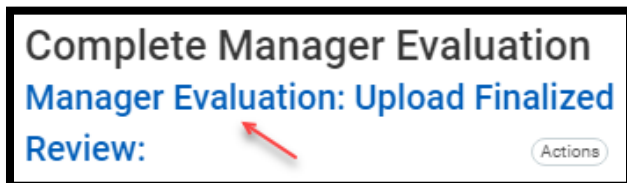
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message.

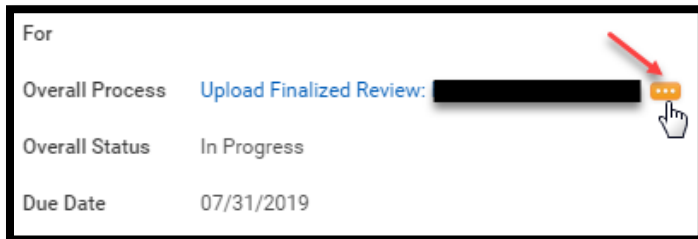
- b) If **Position Number, Rating, or Purpose** on the paper IPPE are the reason for send back, you can edit (see directions to print IPPE) the original paper IPPE (you do not need to create a new one) and re-attach.
- c) If the rating period dates that were entered into Workday are the reason for the send back, you will need to follow the instructions below to cancel the performance review.

TO CANCEL THE IPPE IN WORKDAY

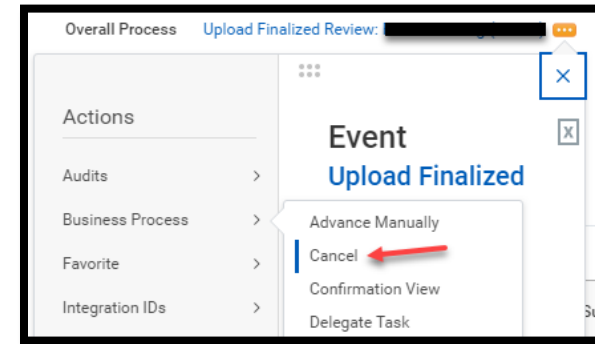
1. Go to **Inbox** – Manager Evaluation.
2. If you need to print the original attachment, follow the printing instructions below.
3. In the **Inbox message**, click on the blue hyperlink "Manager Evaluation: Upload Finalized Review: (Employee's Name)" blue link above.



4. Put your mouse over the "Overall process link" to allow the **Related Action** button to show up and click on it.




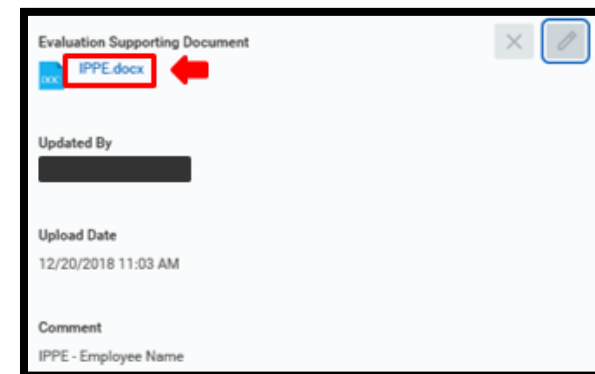
5. Select **Business Process** and then **Cancel**.



6. Enter a **Comment** as to why the business process is being canceled.
7. Click **Submit**.
8. You will then need to restart back at the beginning of the job aid.


TO PRINT THE PAPER IPPE

1. Print the original attachment by clicking the blue hyperlink with the attachment's name and then clicking the print icon  in the upper right corner.



2. Make corrections on paper copy by crossing out incorrect information, writing in correct information, and initialing.

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3. Click the  to delete the original attachment.
4. Click **Add** to attach the new IPPE with the changes and add your comment "IPPE – Employee Name".
5. Click **Submit**.